

## **Guidance for Creating I&E Strategy Matrix in AFMSS For FY 2012**

Please read all instructions carefully and completely as manual updating and creation of data is required. **All inspection priority records must be manually updated using the criteria outlined in the Fiscal Year (FY) 2012 I&E Strategy after performing the Inspection Priority Rollover function.**

(Note: This procedure must be completed in both the Non-Indian and Indian Automated Fluid Minerals Support System (AFMSS) databases for those offices that have both.)

Using the spreadsheet provided to your field office (FO), an overall risk factor must be assigned to each case/operator combination. Since AFMSS has not been changed to accommodate the new risk factors, we will use the existing overall inspection priority codes, but their definitions have changed. Inspection priority codes for production inspections will be as follows:

- a. W (FOGRMA H OTHER H) – Number of Cases with an overall risk factors of 7.5 and above
- b. X (FOGRMA H OTHER L) – Number of Cases with an overall risk factors of 4.0 to 7.49
- c. Y (FOGRMA H OTHER L) – Number of Cases with an overall risk factors of 2.5 to 3.99
- d. Z (FOGRMA H OTHER L) – Number of Cases with an overall risk factors of less than 2.5

On October 1, copies of inspection priority records are created in AFMSS. This means that all inspection priority records that existed in FY 2011 are copied and the FY 2012 records will exist in each database. Do not attempt to create the FY 2012 strategy before October 1.

Ensure that any open inspections are closed.

**Step 1:** Verify that FY 2012 inspection priority records exist in your database. From the AFMSS Main Menu, click on **Monitoring**, and then **Inspections**. Click on the **Priorities** button. In the Inspection Priority List screen (IEP.69), the FY column should show 2012. Click on the Query button to view a list of the records.

**Step 2:** Run the Inspection Priority Rollover (IEP.68). By using this function, the system will create any new inspection priority records for new case/operator combinations. It will also find any priority records that need to be made inactive and will not create a record for the new FY.

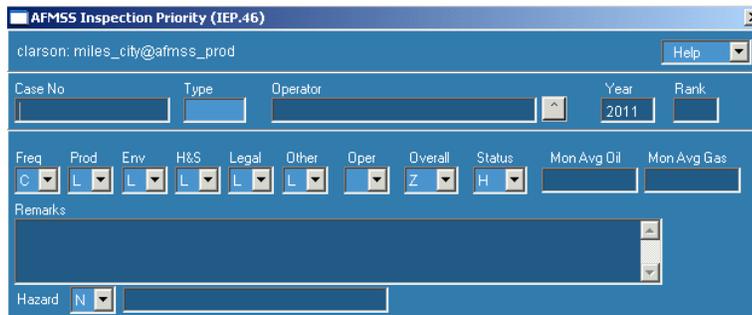
1. From the AFMSS Main Menu, click on the User Support selection, and then select Priority Rollover IEP.68. On this screen there is an option to conduct a “Dry Run.” It is strongly recommended that the Dry Run option is used. **Click to enter a checkmark in the box next to “Dry Run.”** This will produce a report to show you how the priority records will look BEFORE actually committing the changes to AFMSS.

2. The screen also displays two fields to show “rollover from FY” and “rollover to FY.” After October 1, both fields will display “2012.” Click “Yes” if the system asks if you want to overwrite the current new FY records. The system will update the FY 2012 records based on

previous years' criterion, but it will ensure that all records for case/operator combinations are created and inactive records are marks accordingly.

3. Carefully review the Detailed Report and Log File that was created by the Dry Run. After you have reviewed the report, you may again go to the Inspection Priority Rollover (IEP.68) function and actually run the rollover. The Detailed Report and Log File will be created again showing how the records now reside in the system. Again, review the report and note any records that need to be updated or revised.

4. From the AFMSS Main Menu, select Monitoring, and then Inspections. In the lower right corner, click on the Priorities button. Use the spreadsheet query for each case/operator combination on the Inspection Priority List screen (IEP.69). Highlight a record and click on the **Edit Insp Priority** button. The Inspection Priority (IEP.46) screen will be launched (shown below).



On this screen, update the **Overall** Inspection Priority code, using W, X, Y, or Z based on the risk factors as shown **in Column U (Overall Rating) from the spreadsheet** on the Production Tab.

Update the other inspection priority codes as necessary, such as High or Low for Environmental, Health and Safety, etc. You may also update the frequency of inspections, hazard code, and set a Rank for each case/operator. Remarks may be entered as well. These fields will provide useful information, but will not factor into the Overall Inspection Priority for FY 2012.

Enter the average monthly oil and gas fields for the FY 2012 records from Columns D and E from the Production tab of the spreadsheet. Make sure the Status is set appropriately for the record, using H (needs production inspection), A (abandoned but needs environmental inspection until released), and I (inactive because it no longer needs inspection of any type – such as an operator change).

Once all of the inspection priority records have been updated with the correct Overall inspection priority code for FY 2012, you may proceed with creating the I&E Strategy Matrix in AFMSS.

**Step 3:** From the AFMSS Main Menu, click on **Monitoring**, and then on **I&E Strategy**. This will launch the I&E Strategy Matrix – Inspection Items (IEP.54) screen. In the upper left portion of the screen, the Field Office name will be populated. Next to that field, you will see 2012 in the FY box. Enter the name for this FY 2012 matrix into the field titled “Version.” (For example, FY2012 Vernal Field Office.) Next to the Version field, there is a drop down arrow. Select either “Working” or “Official.” Create a “Working” version until you are sure the data is complete and accurate. When it is final, select “Official” and save the record again.

In this screen, click on the “Recount FOGRMA Items” button in the lower left portion of the screen. A message will appear informing you that it may take some time to complete this. Click “Yes” to continue. The system will count the number of producing and non-producing inspection by Overall Priority from the Inspection Priority Record. This will be used to calculate the required number of inspections. Inspection Items with a case status of “A” will not be included.

The Inspection Item fields will populate once the count is completed. Review the total number of inspection items. Note that the number of items displayed will not equal the amount of cases listed on the IEP.51 (Inspection Items) report since the recount does not include those cases with an abandoned status in the inspection priority record.

Enter the number of estimated number of inspections in the remaining fields for Drilling, Plugging, and Workover based on the guidance provided in Attachment 1 of this Instruction Memorandum. Enter the number of Environmental Drilling Inspections, Environmental Producing Inspections, and Environmental Abandonment/Reclamation Inspections as instructed in Attachment 1.

**SAVE THE RECORD.** Make sure the message box in the lower left corner of the screen states that the table was updated.

Click on the Positions/Workmonths button. This will launch the Positions/Work Months (IEP.55) screen. Enter the positions and workmonth information based on your Field Office personnel who work in the program. To ensure proper accounting of workmonths needed, a base of 12 workmonths must be used for each FTE. Complete all fields as appropriate. **SAVE THE RECORD.**

Click on the “EXIT” button to return to IEP.54.

Click on the “Calculations” button. This launches the Truly Strange Required Inspections Calculator (IEP.56) screen. Ensure that TIMES in TOTAL OTHER is set to 33%. **SAVE THE RECORD.** Click on the “Exit” button to return to IEP.54.

Click on the “Inspections Type” button. This will launch the Inspection Type (IEP.58) screen. This screen contains a listing of all inspections types, average hours to conduct these types of inspections, the number of required and planned inspections, and workmonths necessary to conduct the inspections. The average inspection hours and required number of inspections by inspection type are auto-populated based on the data entered in previous screens.

If it is necessary to adjust the average inspection hours, click on the “Insp Hrs” button in the lower corner of the screen. This displays a screen with an entry box for each inspection type. You may enter adjusted times as needed. Click on the SAVE button. Click on the EXIT button. The display on the IEP.58 screen will be updated with the new times.

In IEP.58 screen, for the Records Verifications Planned:

- a. Under FOGRMA enter the number of planned reviews for cases that have an overall risk factor of 4.0 or above.
- b. Under OTHER enter the number of planned reviews for cases that have an overall risk factor of below 4.0. Enter 0 unless all of the cases with overall risk factors of 4.0 and above are planned to be reviewed.

Enter the number of planned inspections for each of the remaining inspection types. The number of planned inspections must be based on the available workmonths indicated in the IEP.55 Positions/Work Months screen. You may tab from field to field, or use the mouse to click on the area you want to enter information. If you do not use the tab key, the system will not generate workmonth information until the record is saved. If you want to see the workmonths displayed after entering the number of inspections, be sure to use the tab key. SAVE THE RECORD. Click on the “EXIT” button to return to IEP.54.

You may review the Required and Planned Inspections by clicking on the “Required/Planned” button. Verify the number of available workmonths against what is planned to ensure that there are not more planned inspections than what you have for the workmonths needed to accomplish those inspections. To revise the planned inspections, return to the IEP.58 screens and make the necessary changes. SAVE THE RECORD and EXIT back to the IEP.54 screen.

To add Remarks or Special Considerations, click on the “Remarks” button. At the present time AFMSS will not allow Well Status Checks (activities) to be tracked by the Inspection Strategy. Field Offices are to include these in developing the Strategy. The number of well status checks planned should be included as remarks in the I&E Strategy Matrix. The number of well status checks completed during the year needs to be tracked by each office and sent to Washington at the end of the fiscal year. Enter any other remarks as applicable. Document any additional idle/orphan well workload, the number of production records reviews, or any other adjustment to the strategy for FY 2012. SAVE THE RECORD and EXIT back to the IEP.54 screen.

NOTE: You may revise the “Working” version of the matrix until you are confident that the matrix is accurate and complete. **Change the field from “Working” to “Official”** to indicate that this is the matrix to be used for this FY.